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ABSTRACT

A strategy for assessing the skill needs of principals and for training them to assume effective instructional leadership is outlined in this paper. A school production model of instructional leadership, supported by research, is presented; the model emphasizes orientation toward specific goals of school productivity and suggests ways to analyze results. A diagnostic instrument designed to assess training needs of principals is described, and the course of its development is discussed in detail. The results of the instrument confirmed that principals view instructional leadership tasks as important and that they feel unprepared for jobs emphasizing instructional leadership. Analysis of research produced 10 competency statements, grouped into 4 clusters. The organizational planning cluster includes schoolwide goal setting, work group performance, and individual staff performance. The staff management cluster includes staff development, clinical supervision, work group development, and quality control. The program management cluster consists of instructional programming and resource development, while the achievement assessment cluster focuses on school evaluation procedures. A figure illustrating the model, tables summarizing the data, and survey instruments are provided. (FWR)

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INSTRUCTIONAL LEADERSHIP EFFECTIVENESS: A RESEARCH ANALYSIS AND STRATEGY

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INSTRUCTIONAL LEADERSHIP EFFECTIVENESS: A RESEARCH ANALYSIS AND STRATEGY

By Karolyn J. Snyder and William L. Johnson

The central job thrust for principals has been redirected in recent years from a school maintenance focus to an instructional leadership emphasis. Student achievement has clearly surfaced as the single most important outcome of schooling, and it is to that product end that the principal's behavior has now been directed.

School districts themselves have responded to social pressures by directing the principal's leadership to the management of instruction. Simultaneously the research community has studied effective schools to learn what principals and teachers do that influences student achievement gains. Numerous studies have now verified that the principal indeed is the key factor in the school's attempts to alter achievement norms (Armor, 1976; Austin, 1979; Berman and McLaughlin, 1980; Brookover and Lezotte, 1979; Edmonds, 1979; Glenn, 1981; Trisman, 1976; Tursman, 1981; Levine and Stark, 1981).

The purpose of this paper is three fold. First we will present a school production model of instructional leadership which serves as a lens to identify effective schooling and leadership characteristics and leadership tasks. Secondly, we will discuss the development of our diagnostic instrument which we designed for school districts to use in assessing the training needs of their principals in relation to instructional leadership tasks. Last, we will report some findings about principals and their perceptions of their own training needs, which we gleaned from our instrument validation process.

I. AN INSTRUCTIONAL LEADERSHIP MODEL FOR SCHOOL PRODUCTIVITY

In 1977 we began to develop a model of instructional leadership (productive school management), defining the new role thrust for principals in relation to variables which appear to influence the quality of instruction both directly and indirectly (Snyder, 1983). Borrowing heavily from a systems approach to management and organization, instructional leadership was conceptualized in terms of the significant school organization process variables that influence instruction and achievement. Consequently, a school planning cluster; staff and program development cluster, and an evaluation cluster were identified as a system of instructional leadership tasks (see figure 1).

Figure 1 Here

The Model assumes that school productivity is based upon a foundation of results oriented school improvement goals which are collaboratively defined. It is further assumed that various goal tasks are identified and assigned both to temporary and permanent work groups, who plan for their work collectively. Individual teachers are held accountable for their performance in the work group context on the basis of specific standards as well as goals. The model further assumes that both instructional and resource programs must be designed and managed to ensure student mastery. Staff development is planned by the school staff around goal related needs, and includes in-class teacher coaching, as well as teacher monitoring. School assessment is based on school goals; an analysis of team and individual growth and productivity results. Student achievement patterns are studied as well in the aggregate. Analysis of these four variables determines overall levels of school productivity.

The model assumes that the principal's primary role preoccupation is with instructional improvements, for the purpose of increasing student achievement norms. It also assumes that the principal understands the learning and teaching process, as well as the organizational influences on teaching performance.

The model further assumes that the principal engages with teachers in the school improvement process, in numerous collaborative configurations, to bring about planned improvements as a community of educators.

A recent analysis of effective schooling research, using the Instructional Leadership Model variables, provides support for the Model and offers insight as to the nature of effective schooling characteristics.

We prepared a second analysis of effective organizations research, using the same model as a lens, which provides a much broader and more comprehensive picture of an effective organization-school. However, for our purposes in this paper, the analysis of effective schooling research provides adequate support for the discussion of our Model.

A summary of the effective schooling analysis follows.

SCHOOLING CHARACTERISTICS CORRELATED WITH STUDENT ACHIEVEMENT

A Summary of Research

I. School Improvement Planning

School-wide Planning

In effective schools, teachers and principals translate collective concerns into specific achievement oriented school improvement goals. Collaborative decision making creates a healthy school climate, which tends to foster a sense of community. Purpose and order for schooling activities result from collaborative goal definitions (Lieberman & Miller, 1978; Armor, 1976; Glenn, 1981; Brookover & Lezotte, 1979; Edmonds, 1979).

Team and Task Force Organization and Planning

Effective schools develop creative approaches for grouping teachers into working teams. Teachers and principals have a collegial working relationship which is exemplified in collaborative action planning, shared decision making and cooperative activity. An interchange of ideas among teachers occurs regularly and permeates school life (Vallina, 1978; Lieberman & Miller, 1978; Austin, 1979; Doss & Holley, 1982).

Individual Performance Planning

In successful schools, both school and teacher goals tend to guide teacher performance. Role expectations are clear and teachers are held accountable for student performance in effective schools (Lieberman & Miller, 1978; California DPE, 1980; Phi Delta Kappa, 1980).

II. Development - Staff

Clinical Supervision

In effective schools principals conduct frequent formal and informal observatons to coach teachers in their development of instructional skills. "Effective teaching" behaviors guide supervision practices as principals and teachers improve teaching, and subsequently, raise the levels of student achievement (Edmonds, 1982; Clausett & Gaynor, 1982; Levine & Stark, 1981).

Staff Development

Staff development programs, that are school-based and linked to improvement goals, are the most effective programs. Staff development is viewed, in successful schools, as an essential variable to improvement efforts, and is planned by teachers and principals together to address skills that are transferable to the classroom (Miller & Wolf, 1978; Levine and Stark, 1981; Lieberman and Miller, 1978; Glenn, 1981; Vanesky & Winfield, 1979).

Performance Management

In successful schools principals control a complex web of staff interactions. The staff is held accountable for its results individually and collectively in a supportive atmosphere (lieberman & Miller, 1978; Cohen, 1981; Levine and Stark, 1981).

III. Development - Program

Instructional Program

In effective schools, principals communicate a system of instructional standards to teachers, coordinating schoolwide curriculum, instruction and testing. Teachers plan and carry out programs together, providing a climate of high achievement expectations for all students. The instructional program is

characterized by adaptability and consistency in general, and by clear and timely instructional cues, reinforcement, correctives and feedback and by active student participation (Coulson, 1977; Marcus, 1976; Levine & Stark, 1981; Klausmeier, 1982; Edmonds, 1979; Vanesky & Winfield, 1979; Lysakowski and Walbert, 1982).

Resource Management

Principals of successful schools plan for, organize and distribute resources to their staff; resource management is tied to school goals. District resources are used to augment the instructional program (Glenn, 1981; Edmonds, 1979; Madden, 1976).

Community Involvement

Successful schools are characterized by significant parent involvement in the instructional program. Many schools become uniquely successful from effective involvement with a particular community business. High levels of parent or community involvement facilitates student achievement; a greater awareness of community issues; and, tends to result in increased satisfaction between parents and the school (Armor, 1976; Reagan, 1977; Hobson, 1976; Vallina, 1978; Austin, 1979).

IV. School Assessment

School Wide

Principals of successful schools develop a schoolwide accountability model. Measures of schoolwide productivity are evidenced in student achievement gains, work group productivity and staff behavior and performance. Students in effective schools are recognized for their accomplishments (Brookover & Lezotte, 1979; Edmonds, 1982).

Team Level

[Not team level assessment practices have been identified that correlate with achievement. It may be that very few assessment practices exist at the team level and therefore can not be studied. Work group evaluation in productive organizations correlates with success when the evaluation is goal based and results oriented.]

Individual Teacher

Successful schools have staff performance reviews by principals. High teacher morale is the chief teacher characteristic in assessing teaching in effective schools. Traditional teacher evaluation programs tend not to correlate with gains in student achievement (Coulson, 1977; Brookover & Lezotte, 1979; Rand Study, 1979).

Student

Successful schools are characterized by continuous evaluation of student progress. The greater the involvement of assessment by the principal, the higher is student achievement. Feedback on progress is useful when standards exist for acnievement and where principals have high expectations. Student academic self concept, and self reliance tend to be high in effective schools (New York City Schools, 1979; Vallina, 1978; Clausett & Gaynor, 1982; Gigleotti & Brookover, 1975; Brookover & Lezotte, 1979).

Research Summary

A picture of the effective school is beginning to emerge. The analysis of instructional leadership tasks verifies that school planning in successful schools generally is collaborative in nature and includes setting school improvement goals that relate to instruction; assigning goal-tasks to teams who plan and carry out their plans collectively; and, holding individual teachers accountable for their role in the school's success through planned and assessed performance. Development of staff is linked to school goals, is planned by the staff and includes workshops and subsequent teacher coaching. The staff is held accountable for its development in a supportive atmosphere. Development of the school's program results from a set of instructional standards that tend to guide improvement activities, and which are flexible and directed to mechanisms that foster student mastery. Resources are available and are used to foster achievement of school goals. The community, including parents, are involved in definable ways in the instructional program.

School assessment is based on an accountability model and includes measures of student gains, work group productivity and staff performance as they each relate to school goals.

The Instructional Leadership Model shown in Figure 1 provides a conceptual framework for identifying leadership tasks central to the school improvement process. Effective schooling research clearly supports all dimensions of this model (with the exception of team evaluation), and provides clear parameters for defining the principal's role in instructional leadership for school productivity.

Model Development and Research

Over the past six years, we have developed a series of training programs for principals in each task function of the Instructional Leadership Model. The materials, which have all been individually field tested in various school districts and professional organization management academies, are in their final form. Our next task is to pilot the training cluster in its aggregate in several school districts.

During our program development, we designed a needs assessment instrument for school district officials to use in identifying the specific training needs of their principals, as they relate to instructional leadership tasks and skills. The remainder of this paper describes the nature of designing that instrument, as well as our findings about administrators' perception of their needs from the validation process.

II. INSTRUMENT DESIGN

The construction and administration of the instrument involved the following steps: (a) development of a pool of instrument questions, (b) development of questionnaire forms, (c) selection of administrative personnel to respond to the instrument, (d) actual administration of the instrument, and (e) development of computer programs for reliability and validity assessments of the instrument.

Pertaining to the selection and development of instrument forms, Tittle and Hill (1967) investigated the predictive efficiency of four frequently used attitute measurement techniques in terms of predicting indices of voter behavior. The Thurston, Guttman, Likert, and semantic differential scales were compared. The Likert scale was superior to all other scales in predictive validity. Their evidence suggested that in cases where the Likert and Thurston scales were of equal length, the Likert scale exhibited higher reliability.

Two Column Instrument Scale Descriptors

For the first version of the "Administrators-For-Change Training" (ACT) Instrument, a two column quasi-Likert response form was chosen because of its applicability in general or first-time assessment trials (Witkin, 1977). Discrepancy as defined by Tyler (1949) is understood to mean a difference between some standard of value and an actual status. Sarthory (1977) defined a need as a quantifiable gap in attitude, achievement, or performance between the ideal and the real.

Kaufman (1972) and Southard (1974) identified the four specific components in a discrepancy needs assessment procedure: (1) determine desired conditions, (2) determine existing conditions, (3) analyze discrepancies between the actual and desired conditions, and (4) assign priorities to the discrepancies. These discrepancies constitute indices of need.

Pertaining to the discrepancy format, respondents rated specific statements on two five-point quasi-Likert scales: (a) perception of the degree to which the situation actually exists and (b) perception of the extent to which the situation is desired to exist. The discrepancy between the two scale values, for a specific question, is referred to as the need index.

The discrepancy format response mode included the following two column response categories: (a) competence (consisting of the following scale): (1) no knowledge of; (2) knowledge of; (3) worked with; (4) extensive work with; (5) expertise in; and (b) training (consisting of the following scale): (1) desire no training, skill unrelated; (2) desire no training, competency

high; (3) desire awareness session; (4) desire training; and (5) desire further training. The competency column is the actual status while the training column is the desired status. Jenkins and Taber (1977) found in an agree/disagree context that the number of response categories above five did not, in any situation, yield a significant increase in Likert discriminability.

Two-Column Instrument Results

A sample of about 200 administrative-type personnel, such as principals, assistant principals, superintendents, assistant superintendents, supervisors, or curriculum directors, responded to the two column instrument. See Appendix A for a sample two column instrument.

Specifically, we found that administrative practitioners were unfamiliar with the scoring technique (a correlated t test was used to calculate the need index). The literature of statistical procedures is replete, however, with descriptions of and derivations for this procedure (Hicks, 1978; Hinkle & Wiersma, 1979; Kerlinger, 1973; Kirk, 1968).

Also there is some question if practitioners can truly assess their competency in this kind of discrepancy-format questionnaire (Witkin, 1977). For these reasons, the next instrument version was changed to a one column "desire-training" format.

One-Column Instrument Scale Descriptors

The discrepancy format was changed to a one-column format with the following descriptors: (1) no training (skill unrelated), (2) no training (competency high), (3) training (awareness level), (4) training (initial practice), (5) training (skill refinement), and (6) assistance with school implementation. In constructing the response columns for the scale, the attempt was made to reflect equidistant order in the six categories. In the continuum from "no training (skill unrelated)" to "assistance with school implementation," the categories were ordered.

Next there is the question of a metric base for the variables. Stevens (1946) wrote that factor analysis requires the

variables be measured on at least an interval level. This requirement is implied by the use of correlation or covariance matrices as the basic input to factor analysis. If it were argued that the scaling used was not absolutely of a metric base, would a researcher always avoid factor analysis? Kim and Mueller (1978) have written that such is not necessarily so. Many variables, such as measures of attitutes and opinions, do not have a clearly established metric base. Furthermore, it is generally assumed that many ordinal variables may be given numeric values without distorting the underlying properties. The final answer to the question of applying multi-variate analysis to a nonmetric variable base really hinges on two considerations: (1) how well the arbitrarily assigned numbers reflect the underlying true distances, and (2) the amount of distortion introduced in the correlation procedures (which become the basic input to factor analysis) by the distortions of scaling. Fortunately, the correlation coefficients are fairly robust with respect to ordinal distortions in measurement (Kim, 1975; Labovitz, 1967, 1970). Hence, as long as one can assume that the distortions introduced by assigning numeric values to ordinal categories are not very substantial, treating ordinal variables as if they are metric variables can be justified (Kim & Mueller, 1978). The scale descriptions were written to reflect as near a metric base as possible. It was felt the distortions were minimal and the application of factor analysis to the data would be consistent with factor analytic models used in instrument development.

One-Column Quasi-Likert Instrument

The scale was constructed to assess administrative training desires in seven specified areas: (1) the principalship; (2) the school as an ecological system; (3) creative problem solving; (4) staff development; (5) collaborative long range planning; (6) planning for school growth; and (7) personal awareness.

These subscales and a brief content description of each follows. First was the principalship consisting of questions embracing the perspectives of leadership, planning, organizing,

motivating organizational behavior, and controlling. Next was the topic of the school as an ecological system. Questions addressed the environmental suprasystem as well as the goal, psychosocial, structural, technical, and management subsystems.

The third subscale was creative problem solving focusing on real school organizational problems from the perspective of roles, communication skills, and problem solving steps. Next was planning for school growth, which focused on the principal's varied tasks such as action planning and force field analysis.

The fifth subscale addressed was staff development encompassing clinical supervision, inservice training, and evaluation. The sixth subscale was collaborative long-range planning for school improvement which included goal setting, resource assessment, program planning, implementation and monitoring functions, and evaluation procedures. Finally, there was a personal awareness subscale embracing the perspectives of personality characteristics, self-concept, and administrative-style effectiveness. The questions were then randomly assigned to the test form.

Administration of the One-Column Instrument

The number of cases used in the scale validation was 442. This number was arrived at by having at least five times as many subjects as try-out items (Lemke & Wiersma, 1976; Nunnally, 1970).

Participant summary data, listing the participating school districts and the number of participants from each district, follows: (1) Amarillo, Texas (Amarillo Independent School District, 52 cases); (2) Burlington, North Carolina (Burlington City Schools, 23 cases); (3) Dickinson, Texas (Dickinson Independent School District, 16 cases); (4) Fort Worth, Texas (Fort Worth Independent School District, 195 cases); (5) Phoenix, Arizona (Paradise Valley Unified School District, 15 cases); (6) Raytown, Missouri (Consolidated School District Number Two, 31 cases); (7) St. Louis, Missouri (Ritenour School District, 23 cases); (8) Wichita, Kansas (Wichita Independent School District, 84 cases); and (9) separate responses (three cases).

The respondents' professional classifications and group totals are as follows: (1) elementary principals and assistant principals (229 cases); (2) middle and junior high principals and assistant principals (45 cases); (3) secondary principals and assistant principals (57 cases); (4) superintendents and assistant superintendents (18 cases); (5) supervisors and curriculum directors (77 cases); (6) education service center personnel (eight cases); and (7) unsigned category composite (eight cases).

Final Scale Analysis of the One-Column Instrument

The collected pool of data was submitted to factor and subscale analyses (Nie, Hull, Jenkins, Steinbrenner, & Bent, 1975). Instrument validity was established by two methods. First content validity involves essentially the systematic examination of the scale content to determine whether it covers a representative sample of the domain to be measured (Anastasi, 1976; Ebel, 1956; Huddleston, 1956; Lennon, 1956). Representative selection of items and sensible test construction are cited by Nunnally (1967) as the standard means of ensuring content validity.

The content validty of the ACT instrument was established therefore in the following manner: each subscale area was reviewed and questions were written which were believed to be representative of the behaviors, attitudes, or characteristics to be measured.

Next, construct validity was established. The construct validity of a test is the extent to which the test may be said to measure a theoretical construct or trait (Anastasi, 1976). Essential to the notion of construct validity is the internal consistency of the items (Nunnally, 1967). Of particular relevance to construct validity is factor analysis. Lemke and Wiersma (1976) have stated that factor analysis is a refined technique for analyzing the interrelationships of behavior data, simplifying the description of data by reducing the number of necessary variables or dimensions (Anastasi, 1976; Kim & Mueller, 1978). A stepwise factor analysis was applied specifically to examine the way in which the scale items grouped together. The factoring method was PA2; the method of rotation was varimax.

Specifically scale items were retained in the instrument only if they had a factor loading greater than or equal to .40. The rule of thumb often used in this context is to consider factor loadings less than .30 as not substantial (Kim & Mueller, 1978).

Evaluation of the reliability of the instrument was accomplished through use of the Kuder-Richardson generalized reliability formula, coefficient alpha (Cronbach, 1951; Ebel, 1965; Novick & Lewis, 1967). This formula was appropriate since a Likert scaling format was employed in the instrument form.

Application of Cronbach's alpha to all the collected data for the final test version yielded a reliability coefficient of .96, which is considerably higher than the minimum value of .50 often cited as necessary for the evaluation of group achievement and slightly larger than the value of .90 cited as necessary for the assessment of individual achievement (Cronbach, 1970). Anastasi (1976) has posited that it is desireable for reliability coefficients to fall in the range of .80s or .90s. The reliability of the instrument was shown to be high.

Table 1 indicates that 50 items remained in the ACT instrument following the elimination of 26 items suggested as inappropriate by the factor analysis. The two planning subscales for the original scale (planning for school growth and collaborative long range planning) are listed as one planning subscale in Table 1. In addition a Goal-Setting factor of six items emerged in the analysis. The factor analysis allows one to conclude that 50 items give a more or less complete indication of the seven training areas. These 50 items can be grouped into seven meaningful components: creative problem solving (five questions); personal awareness (six questions); staff development (five questions); planning (19 questions); goal setting (six questions); the school as an ecosystem (six questions); and the principalship (five questions). /TABLE 1 HERE/

The Cronbach alphas for these subscales follow: creative problem solving (.82); personal awareness (.86); staff develop-

ment (.82); planning (.94); the school as an ecosystem (.76); the principalship (.82); and goal setting (.82).

A comment is perhaps warranted pertaining to the school as an ecosystem subscale. On the factor analysis, questions 20 and 27 were placed into this factor. The alpha value of the seven question subscale was .82. Both questions were discarded, however, because they clearly did not belong in the subscale. Since both questions related to clinical supervision, it was believed that the participants were unfamiliar with the notions of clinical supervision. Their response patterns did, however, place these two questions into the ecosystem subscale. The remaining five questions for the subscale had an alpha value of .76. The Cronbach value for the entire instrument was .96. Table 2 indicates summary statistics for the 50 items in the final version of the instrument. Listed are item communalities, means (M), Medians (Mdn), modes (Mo), standard deviations (SD), and standard errors (SE). The instrument in its final form is included in Appendix B. /TABLE 2 HERE/

The instrument has been shown to be a reliable and valid psychometric scale. Because of the high reliability measures, the instrument can be used either for individual or group assessment. Separate administration of the subscales for individual assessment would not be appropriate, except for the planning subscale which has an acceptable Cronbach alpha value. Group assessment using all the subscales individually would be appropriate.

Current Instrument Development Activities

Through extensive field testing, a need emerged to develop a refined version of an assessment instrument. As the model has been refined, we are currently in the process of field testing a new self-scoring instrument that both draws upon our experiences with the instrument format and training programs, and which includes a self-scoring, rather than a computer scoring, procedure. Current research on instrumentation suggests that the following six descriptors are the most appropriate for research

purposes, since they are equidistant on a response continuum:

(1) disagree strongly
(2) disagree
(3) tend to disagree
(4) tend to agree
(5) agree
(6) agree strongly

The new instrument will relfect refinements in specific instrument items. In addition, the new instrument will enable principals to receive immediate feedback on the nature of their skill needs, and, in addition, will provide them with a basis for setting performance goals, and guide planning for training programs.

III. Leadership Training Needs: What We Learned

During the validation phase of the one-column instrument, administrators from across the nation completed the leadership training instrument survey.

Results of that survey reinforced our belief that certification training in universities is generally inadequate for the role needs of principals in the 1980's.

In many studies conducted over the past several decades, principals continuously reported that their initial administrative training programs are limited both in content and methodology. Consequently, initial training experiences limit influence on actual role performance. Further, on-the-job learning appears to be a major source of influence on task performance. Knowledge and skills necessary for effective leadership is either fragmented and piecemeal or is lacking all together in inservice training programs (Pitner, 1982). Staff development programs for principals tend to respond only briefly to current topics, ignoring emerging basic skills and knowledge. What is needed is a combination of certification and inservice programs for principals that provide "hot" topic reviews, and in addition, the basic skills for effective school leadership.

Of the seven categories surveyed, principals reported that they desired training in all categories (rather than one or several), with the desires ranging between awareness level training and skill refinement. Table 3 outlines the preferences of all the principals for training; all categories were perceived to be important to role success. Staff Development was the category of most concern to the principals. The last in rank was the category describing the school's ecology, and organizational factors that influence achievement results.

Insert Table 3 Here

While all seven categories are distinct from each other, each seemed to represent an element that principals perceive important in providing effective instructional leadership in the 1980's. The study seems to affirm that principals view instructional leadership tasks as important, and perceive them to be a desirable focus for their own professional development activities. Furthermore, the skills necessary for successful collaboration, organizational assessment and analysis, and knowledge of how personal characteristics influence leadership all appear to be important to the successful implementation of instructional leadership tasks.

In this study, school principals expressed a desire for training in all categories surveyed The data show that instructional leadership tasks are important and that school principals perceive them to be a desirable focus for their own professional development activities. The data further show that principals perceive they are largely unprepared for their jobs as they shift to an emphasis on instructional leadership.

The research on effective schools verifies that altering student achievement norms requires certain schooling characteristics beyond actual teaching that in the aggregate influence achievement. Not only do principals need to be involved in teacher training and coaching and in management of the school's instructional program, but leadership is essential for establishing and managing the school's goal set and the action groups,

and the organizational support environment necessary for school success.

III. COMPETENCIES FOR PRODUCTIVE SCHOOL MANAGEMENT

A direct outcome of our research and our training with thousands of principals over the past six years has prompted us to synthesize our findings into ten competency statements. The skill emphasis assumes a sound knowledge base in organization, management and instruction.

SCHOOL MANAGEMENT COMPETENCIES

ORGANIZATIONAL PLANNING CLUSTER

1. SCHOOL-WIDE GOAL SETTING: Establish annual school development goals through administrative assessment and selection and also through total staff collaborative decision making.
2. WORK GROUP PERFORMANCE: Designate school work groups, both teaching teams or departments and task forces, to which are assigned school goal objectives and action planning responsibilities.
3. INDIVIDUAL STAFF PERFORMANCE: Establish and operationalize a teacher performance system that includes performance standards, individual goal setting and action planning procedures, performance monitoring, due process procedures, and evaluation.

STAFF MANAGEMENT CLUSTER

4. STAFF DEVELOPMENT: Develop and operationalize a school program for staff growth that emphasizes new knowledge and skills that are necessary for successful attainment of school development goals (school, work group, individual).
5. CLINICAL SUPERVISION: Develop and operationalize a peer and supervisory clinical supervision program for all teachers and teams, where performance feedback and correctives are provided weekly.
6. WORK GROUP DEVELOPMENT: Establish a healthy work climate and develop work group skills in action planning, creative and productive group communications, problem solving, and decision making. (This competency area resulted from our research analysis.)

7. QUALITY CONTROL: Establish and operationalize a quality control system for work groups and individuals which includes goal-based observations, conferencing, periodic progress reports and plans, and conferencing and supervisory plans.

PROGRAM MANAGEMENT CLUSTER

8. INSTRUCTIONAL PROGRAM: Establish and operationalize an instructional program that reflects up-to-date research on teaching and learning, and the guides teaching improvement efforts in the following areas: curriculum implementation, student diagnosis and placement, program planning, classroom management, teaching, and learning.
9. RESOURCE DEVELOPMENT: Facilitate staff productivity in work groups and provide necessary resources for making the school an increasingly productive unit.

ASSESSING ACHIEVEMENT CLUSTER

10. Establish and operationalize a set of school evaluation procedures to assess student achievement gains, teaching team and task force productivity, individual teacher performance, and total school productivity.

Concluding Remarks

There exist strong implications for researchers as well as university degree and certification programs. The field of educational administration must seek to identify sound theory and practice with regard to organizational management, instructional leadership and school productivity. University programs need to be redesigned around emerging knowledge bases and guide further research as well as standards for certification and performance.

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FIGURE 1

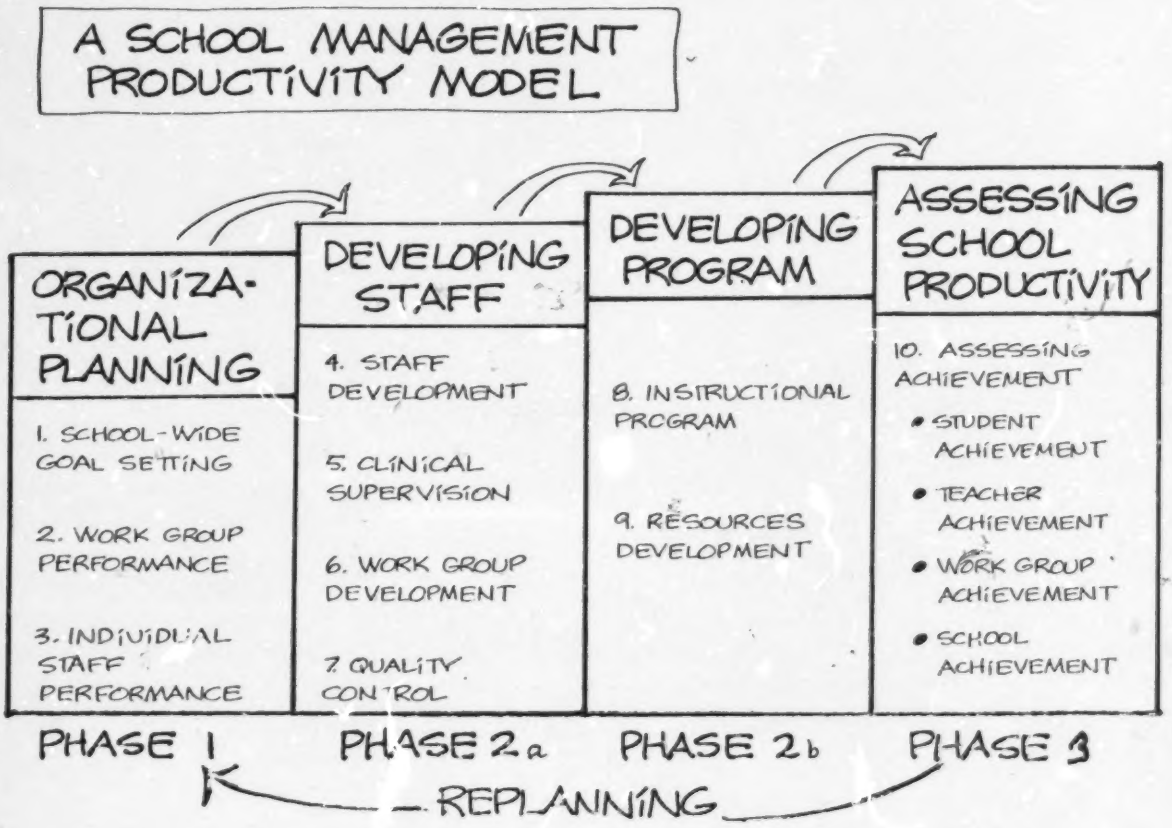
A SCHOOL MANAGEMENT PRODUCTIVITY MODEL
ORGANIZATIONAL PLANNING
1. SCHOOL-WIDE GOAL SETTING
2. WORK GROUP PERFORMANCE
3. INDIVIDUAL STAFF PERFORMANCE
DEVELOPING STAFF
4. STAFF DEVELOPMENT
5. CLINICAL SUPERVISION
6. WORK GROUP DEVELOPMENT
7. QUALITY CONTROL
DEVELOPING PROGRAM
8. INSTRUCTIONAL PROGRAM
9. RESOURCES DEVELOPMENT
ASSESSING SCHOOL PRODUCTIVITY
10. ASSESSING ACHIEVEMENT
• STUDENT ACHIEVEMENT
• TEACHER ACHIEVEMENT
• WORK GROUP ACHIEVEMENT
• SCHOOL ACHIEVEMENT
PHASE 1
PHASE 2a
PHASE 2b
PHASE 3
REPLANNING

TABLE 1

SUMMARY STATISTICS FOR THE FINAL TEST VERSION

Item Number Final Version	Communality	M	Mdn	Mo	SD	SE
1	0.45966	3.658	3.750	5	1.442	0.069
2	0.49748	3.803	4.014	5	1.438	0.068
3	0.53785	3.756	4.057	5	1.512	0.072
4	0.55876	3.914	4.347	5	1.484	0.071
5	0.44801	3.466	3.320	2	1.452	0.069
6	0.52804	3.738	4.035	5	1.510	0.072
7	0.40652	3.864	4.044	5	1.406	0.067
8	0.64550	3.448	3.437	3	1.388	0.066
9	0.58510	3.260	3.273	3	1.421	0.068
10	0.56622	3.941	4.236	5	1.362	0.065
11	0.68830	4.090	4.560	5	1.377	0.066
12	0.45709	3.900	4.061	5	1.311	0.062
13	0.52961	4.145	4.523	5	1.344	0.064
14	0.51157	3.860	4.124	5	1.373	0.065
15	0.59612	4.106	4.572	5	1.408	0.067
16	0.47208	3.468	3.458	5	1.432	0.068
17	0.58380	3.957	4.523	5	1.471	0.070
18	0.53447	4.016	4.386	5	1.364	0.065
19	0.52903	3.891	4.114	5	1.381	0.066
20	0.53979	3.934	4.133	5	1.333	0.063
21	0.52449	3.835	4.124	5	1.404	0.067
22	0.57280	3.905	4.272	5	1.357	0.065
23	0.59578	3.706	3.868	5	1.432	0.068
24	0.59050	3.921	4.181	5	1.340	0.064
25	0.54558	3.654	3.786	5	1.501	0.071
26	0.66280	3.903	4.167	5	1.389	0.066
27	0.67418	3.928	4.253	5	1.362	0.065
28	0.48750	3.912	4.235	5	1.433	0.068
29	0.58159	3.876	4.179	5	1.437	0.068
30	0.62966	3.905	4.329	5	1.451	0.069
31	0.56524	3.876	4.123	5	1.437	0.068
32	0.44634	3.941	4.191	5	1.341	0.064
33	0.60779	3.744	3.925	5	1.430	0.068
34	0.58177	3.867	4.081	5	1.334	0.063
35	0.53460	3.842	4.075	5	1.475	0.070
36	0.56484	4.072	4.506	5	1.370	0.065
37	0.63752	3.729	3.923	5	1.514	0.072
38	0.59904	3.758	4.076	5	1.482	0.071

TABLE 1 --Continued

Item Number Final Version	Communality	M	Mdn	Mo	SD	SE
39	0.69267	4.034	4.542	5	1.384	0.066
40	0.53887	4.034	4.448	5	1.376	0.065
41	0.65279	4.066	4.537	5	1.365	0.065
42	0.55061	3.989	4.322	5	2.320	0.063
43	0.63096	4.131	4.539	5	1.346	0.064
44	0.59563	3.869	4.134	5	1.426	0.068
45	0.62612	3.828	4.073	5	1.387	0.066
46	0.59401	3.708	3.890	5	1.498	0.071
47	0.56754	3.910	4.314	5	1.376	0.065
48	0.61219	3.955	4.511	5	1.488	0.071
49	0.55036	3.697	3.900	5	1.445	0.069
50	0.66471	4.167	4.743	5	1.507	0.072

TABLE 2

Summary Statistics for the One-Column Instrument

Item Number Final Version	Communality	M	Mdn	Mo	SD	SE
1	0.45966	3.658	3.750	5	1.442	0.069
2	0.49748	3.803	4.014	5	1.438	0.068
3	0.53785	3.756	4.057	5	1.512	0.072
4	0.55876	3.914	4.347	5	1.484	0.071
5	0.44801	3.466	3.320	2	1.452	0.069
6	0.52804	3.738	4.035	5	1.510	0.072
7	0.40652	3.864	4.044	5	1.406	0.067
8	0.64550	3.448	3.437	3	1.388	0.066
9	0.58510	3.260	3.273	3	1.421	0.068
10	0.56622	3.941	4.236	5	1.362	0.065
11	0.68830	4.090	4.560	5	1.377	0.066
12	0.45709	3.900	4.061	5	1.311	0.062
13	0.52961	4.145	4.523	5	1.344	0.064
14	0.51157	3.860	4.124	5	1.373	0.065
15	0.59612	4.106	4.572	5	1.408	0.067
16	0.47208	3.468	3.458	5	1.432	0.068
17	0.58380	3.957	4.523	5	1.471	0.070
18	0.53447	4.016	4.386	5	1.364	0.065
19	0.52903	3.891	4.114	5	1.381	0.066
20	0.53979	3.934	4.133	5	1.333	0.063
21	0.52449	3.835	4.124	5	1.404	0.067
22	0.57280	3.905	4.272	5	1.357	0.065
23	0.59578	3.706	3.868	5	1.432	0.068
24	0.59050	3.921	4.181	5	1.340	0.064
25	0.54558	3.654	3.786	5	1.501	0.071
26	0.66280	3.903	4.167	5	1.389	0.066
27	0.67418	3.928	4.253	5	1.362	0.065
28	0.48750	3.912	4.235	5	1.433	0.068
29	0.58159	3.876	4.179	5	1.437	0.068
30	0.62966	3.905	4.329	5	1.451	0.069
31	0.56524	3.876	4.123	5	1.437	0.068
32	0.44634	3.941	4.191	5	1.341	0.064
33	0.60779	3.744	3.925	5	1.430	0.068
34	0.58177	3.867	4.081	5	1.334	0.063
35	0.53460	3.842	4.075	5	1.475	0.070
36	0.56484	4.072	4.506	5	1.370	0.065
37	0.63752	3.729	3.923	5	1.514	0.072
38	0.59904	3.758	4.076	5	1.482	0.071
39	0.69267	4.034	4.542	5	1.384	0.066
40	0.53887	4.034	4.448	5	1.376	0.065
41	0.65279	4.066	4.537	5	1.365	0.065

TABLE 2 Continued

Item Number Final Version	Communality	M	Mdn	Mo	SD	SE
42	0.55061	3.989	4.322	5	2.320	0.063
43	0.63096	4.131	4.539	5	1.346	0.064
44	0.59563	3.869	4.134	5	1.426	0.068
45	0.62612	3.828	4.073	5	1.387	0.066
46	0.58401	3.708	3.890	5	1.498	0.071
47	0.56754	3.910	4.314	5	1.376	0.065
48	0.61219	3.955	4.511	5	1.488	0.071
49	0.55036	3.697	3.900	5	1.445	0.069
50	0.66471	4.167	4.743	5	1.507	0.072

TABLE 3

RANKING (HIGH-TO-LOW) OF THE NEED INDICES FOR THE INSTRUCTIONAL LEADERSHIP SURVEYS

RANK	AREA	NEED INDEX
#1	STAFF DEVELOPMENT (questions relating to clinical supervision, training and teacher evaluation)	4.037
#2	CREATIVE PROBLEM SOLVING (questions relating to cooperative decision making)	4.036
#3	THE PRINCIPALSHIP (questions relating to instructional leadership expectations)	3.932
#4	PERSONAL AWARENESS (questions relating to the principal's self-concept, personality, leadership style and their influence on instructional leadership behaviors)	3.930
#5	PLANNING FOR SCHOOL GROWTH (questions relating to organizational analysis and school leadership planning)	3.888
#6	COLLABORATIVE LONG RANGE PLANNING (questions relating to cooperative goal setting and action planning, monitoring and evaluation)	3.793
#7	SCHOOL AS AN ECOLOGICAL SYSTEM (questions relating to school goals, organization, performance, program, technology and management and how these guide the school improvement process)	3.539

APPENDIX A

TWO-COLUMN SURVEY INSTRUMENT

Introduction

The purpose of this questionnaire is to obtain pertinent information relative to your knowledge and desire for training concerning your administrative role. Thus, this information will be used to plan training sessions for administrative personnel. The questionnaire contains a list of selectively-designed questions pertaining to various skills required of administrators.

Directions

1. On the following page, read the first statement describing a skill and indicate your extent of competency by circling a number in the left-hand column marked Competence. The following definitions may be used to guide your response:

Expertise In -- You have experience in the practice or procedure in diverse situations; because of your experience or training you are able to serve as a consultant, conduct a workshop, or lead a task group in the area.

Extensive Work With -- You have utilized the practice or procedure (even modified it in circumstances) repeatedly in your administrative role.

Worked With -- Your knowledge extends beyond definition; for example, you have read articles in the area or have discussed the implications of the practice or procedure.

No Knowledge Of -- Your knowledge of the practice or procedure extends to no more than a simple definition.

2. Then determine your extent of interest or desire for training by circling a number in the right-hand column marked Training. The following definitions may be used to guide your responses.

Desire Further Training -- You are familiar with the practice or process, have had some training (or are currently undergoing training), and desire more training; you would prefer training to begin at an intermediate or advanced level.

Desire Training -- You are familiar with the practice or process, or your knowledge is only cursory; you would prefer training to begin at the introductory level.

Desire Awareness Session -- You are unfamiliar with the practice or process and you would prefer a short overview to acquaint yourself.

Desire No Training, Competency High -- You do not desire training in the practice or procedure, because you feel your degree of competency is high.

Desire No Training, Skill Unrelated -- You do not desire training in the practice or procedure, because you feel the skill is unrelated to your administrative task/assignment.

3. Repeat the procedure stated on the preceding page for all the statements on the survey questionnaire. Thank you again for your help in this very important matter.

	COMPETENCE						TRAINING				
	No Knowledge Of	Knowledge Of	Worked With	Extensive Work With	Expertise In	Statement of Skill	Desire No Training Skill Unrelated	Desire No Training Competency High	Desire Awareness Session	Desire Training	Desire Further Training
(1)	1	2	3	4	5	How to monitor the implementation of school improvement plans?	1	2	3	4	5
(2)	1	2	3	4	5	How to lead my staff and parents in long range planning?	1	2	3	4	5
(3)	1	2	3	4	5	How to assess the various forces within and outside my school and their influence on my goals for improvement?	1	2	3	4	5
(4)	1	2	3	4	5	How to assess the growth needs of my faculty?	1	2	3	4	5
(5)	1	2	3	4	5	How to increase my visions of the possibilities for educational change in my school?	1	2	3	4	5

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	COMPETENCE						TRAINING				
	No Knowledge Of	Knowledge Of	Worked With	Extensive Work With	Expertise In	Statement of Skill	Desire No Training Skill Unrelated	Desire No Training Competency High	Desire Awareness Session	Desire Training	Desire Further Training
(6)	1	2	3	4	5	How to develop collaborative action plans for accomplishing school goals?	1	2	3	4	5
(7)	1	2	3	4	5	How to assess the needs of my school and set my own goals for improvement?	1	2	3	4	5
(8)	1	2	3	4	5	How to plan for change and to be responsible to the emerging needs of my staff, students and parents?	1	2	3	4	5
(9)	1	2	3	4	5	How to develop effective action plans for accomplishing school goals?	1	2	3	4	5
(10)	1	2	3	4	5	How to assess my own beliefs and values in relation to what exists in my school currently and to my visions for improvement?	1	2	3	4	5
(11)	1	2	3	4	5	How to assess our resources for all goals?	1	2	3	4	5
(12)	1	2	3	4	5	How to identify my own personal characteristics and their effect on my performance?	1	2	3	4	5

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WORKSHOP PREFERENCES

Do you feel that a workshop or seminar on the topics which you indicated strong interest in would be of benefit to you?

____yes ____no

If "yes," would you be willing to participate in a workshop or seminar dealing with one of the topics if the time and place were convenient to you?

____yes ____no

Comments:

If "yes," how much time would you be willing to spend in a workshop dealing with one of the topics or areas that you checked?

____½day ____1 day ____2 days ____3 days

Comments:

Which time schedule(s) would be convenient for you?

____week days ____weekends ____during holidays (i.e., Christmas, summer, spring vacation)

Comments:

Would you prefer to get graduate credit for attendance in a workshop if it were extended to a semester's length (roughly 45 class hours)?

____yes ____no

Comments:

How far would you be willing to travel to attend a workshop or a seminar dealing with topics that you checked?

____ less than 20 miles ____20-50 miles ____31-100 miles

Comments:

Please give suggestions you may have relative to planning this type of workshop:

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	COMPETENCE						TRAINING				
	No Knowledge Of	Knowledge Of	Worked With	Extensive Work With	Expertise In	Statement of Skill	Desire No Training Skill Unrelated	Desire No Training Competency High	Desire Awareness Session	Desire Training	Desire Further Training
(13)	1	2	3	4	5	How to involve teachers, students, and parents in planning for school improvement?	1	2	3	4	5
(14)	1	2	3	4	5	How to assess my administrative effectiveness in working with my staff, students, and parents to improve my school?	1	2	3	4	5
(15)	1	2	3	4	5	How to design inservice programs which increase the effectiveness of my staff?	1	2	3	4	5
(16)	1	2	3	4	5	How to organize my school so as to maximize our resources in accomplishing our purposes?	1	2	3	4	5
(17)	1	2	3	4	5	How to plan for and conduct staff evaluation?	1	2	3	4	5
(18)	1	2	3	4	5	How to motivate my staff to work at the peak of their potential?	1	2	3	4	5
(19)	1	2	3	4	5	How to develop creative solutions to school problems?	1	2	3	4	5

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APPENDIX B

ONE-COLUMN SURVEY INSTRUMENT

BEST COPY

IMMEDIATE DESIRE							
	No Training (Skill Unrelated)	No Training (Competency High)	Training: Awareness Level	Training: Initial Practice	Training: Skill Refinement	Assistance with School Implementation	Statement of Skill
(1)	1	2	3	4	5	6	Identifying personal factors that foster school leadership.
(2)	1	2	3	4	5	6	Deciding specific actions (events) that need to occur in order to accomplish my school (district) goals.
(3)	1	2	3	4	5	6	Planning for the involvement of parents, students and staff in setting school goals.
(4)	1	2	3	4	5	6	Identifying appropriate learning activities for inservice programs.
(5)	1	2	3	4	5	6	Identifying my beliefs in regard to staff/student learning, growth, school organization and instruction.
(6)	1	2	3	4	5	6	Organizing the school organization around school goals.
(7)	1	2	3	4	5	6	Integrating external school pressures, guidelines and policies with internal school (district) needs and goals.
(8)	1	2	3	4	5	6	Identifying the subsystems of school (district) organization and their effects on school performance.

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IMMEDIATE DESIRE

	No Training (Skill Unrelated)	No Training (Competency High)	Training: Awareness Level	Training: Initial Practice	Training: Skill Refinement	Assistance with School Implementation	Statement of Skill
(9)	1	2	3	4	5	6	Analyzing a school (district) as an ecosystem.
(10)	1	2	3	4	5	6	Developing group creative problem-solving skills.
(11)	1	2	3	4	5	6	Leading a staff toward creative solutions to problems.
(12)	1	2	3	4	5	6	Categorizing multiple possibilities into workable strategies.
(13)	1	2	3	4	5	6	Determining annual strategies for individual teacher improvement.
(14)	1	2	3	4	5	6	Determining when to intervene in the school improvement process.
(15)	1	2	3	4	5	6	Linking teacher performance standards and plans to school goals and to teacher evaluation.
(16)	1	2	3	4	5	6	Identifying the sources of and the categories for school (district) goals.

BEST COPY

IMMEDIATE DESIRE

	No Training (Skill Unrelated)	No Training (Competency High)	Training: Awareness Level	Training: Initial Practice	Training: Skill Refinement	Assistance with School Implementation	Statement of Skill
(17)	1	2	3	4	5	6	Keeping a school staff on an agreed-upon course of activities and practices.
(18)	1	2	3	4	5	6	Developing strategies for supervisory conference feedback.
(19)	1	2	3	4	5	6	Evaluating the effects of goal implementation.
(20)	1	2	3	4	5	6	Altering the influence of forces at work to accomplish my school (district) goals more effectively.
(21)	1	2	3	4	5	6	Developing pre-observation conference planning techniques for supervision.
(22)	1	2	3	4	5	6	Critiquing ideas while keeping communications open.
(23)	1	2	3	4	5	6	Identifying the focus for and prioritizing school goals.
(24)	1	2	3	4	5	6	Critiquing problem solutions until they are acceptable and workable.
(25)	1	2	3	4	5	6	Managing the boundaries between internal (school/community) and external (district/state) pressures for change.

BEST COPY

IMMEDIATE DESIRE

	No Training (Skill Unrelated)	No Training (Competency High)	Training: Awareness Level	Training: Initial Practice	Training: Skill Refinement	Assistance with School Implementation	Statement of Skill
(26)	1	2	3	4	5	6	Identifying my personality characteristics and their influence on my leadership effectiveness.
(27)	1	2	3	4	5	6	Identifying personal leadership style and its effect on my performance.
(28)	1	2	3	4	5	6	Assessing the growth needs of my school organization.
(29)	1	2	3	4	5	6	Linking annual school goals to team and to teacher goals.
(30)	1	2	3	4	5	6	Linking school goals to teacher evaluation.
(31)	1	2	3	4	5	6	Developing a time-line of events so that my goals will be accomplished.
(32)	1	2	3	4	5	6	Increasing my vision of what is possible in my school (district).
(33)	1	2	3	4	5	6	Analyzing available resources for school activities.

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IMMEDIATE DESIRE

	No Training (Skill Unrelated)	No Training (Competency High)	Training: Awareness Level	Training: Initial Practice	Training: Skill Refinement	Assistance with School Implementation	Statement of Skill
(34)	1	2	3	4	5	6	Identifying the various forces at work and their negative and positive influence on my school goals.
(35)	1	2	3	4	5	6	Ensuring that school goals reflect the concerns of the entire school community.
(36)	1	2	3	4	5	6	Determining the combined effect of my personality, self-concept, leadership and beliefs on my job performance.
(37)	1	2	3	4	5	6	Developing a school-wide goal setting process.
(38)	1	2	3	4	5	6	Prioritizing activities to accomplish school goals.
(39)	1	2	3	4	5	6	Developing strategies for accomplishing school goals.
(40)	1	2	3	4	5	6	Identifying individual and total staff growth needs.
(41)	1	2	3	4	5	6	Developing procedures for collecting and analyzing data from classroom observations.
(42)	1	2	3	4	5	6	Clarifying and analyzing problems succinctly.

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IMMEDIATE DESIRE

	No Training (Skill Unrelated)	No Training (Competency High)	Training: Awareness level	Training: Initial Practice	Training: Skill Refinement	Assistance with School Implementation	Statement of Skill
(43)	1	2	3	4	5	6	Developing skill in identifying and utilizing various methodologies for classroom observation.
(44)	1	2	3	4	5	6	Sequencing learning activities in in-service programs to foster desired growth.
(45)	1	2	3	4	5	6	Identifying my self-concept strengths and weaknesses and their effects on my goals.
(46)	1	2	3	4	5	6	Conducting monthly or quarterly evaluation of school improvement plans and accomplishments.
(47)	1	2	3	4	5	6	Assessing my own professional growth needs.
(48)	1	2	3	4	5	6	Controlling school activities so that goals are accomplished.
(49)	1	2	3	4	5	6	Setting short range project goals.
(50)	1	2	3	4	5	6	Evaluating teacher performance.

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DEMOGRAPHIC INFORMATION

Please mark the appropriate blank. Feel free to add comments when you feel that they are applicable.

JOB TITLE which best describes your position:

____principal ____assistant principal
____superintendent ____assistant superintendent
____supervisor or curriculum director
____education service center personnel ____university faculty

DIVISION(S) for which you are responsible:

___ elementary ___ middle or junior high school ___ high school

SIZE of school district (region):

____less than 500 scholastics
____500-2,000 scholastics
____more than 2,000 scholastics

SETTING of school district is mainly:

____urban ____suburban ____rural

MAJOR ECONOMIC support for the community comes from (one or more):

____agriculture ____oil ____military ____ ranching
____no dominant industry or trade ____other: Specify_____

ETHNIC BREAKDOWN (rough percentage) of your school community:

____%Anglo ____%Black ____%Spanish-speaking __%Non-American
____%Indian ____%Other: Specify_____

PARTICIPANT'S NAME _____

_____

MAILING ADDRESS _____

_____

_____

_____

_____

ZIP CODE_____

DATE_____

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